

3rd October, 1945.

B.S.1945/9B.

NEW SOUTH WALES.

BUSINESS STATISTICS - SEPTEMBER, 1945.

Commonwealth
Bureau of Census & Statistics
Canberra, Australia,
LIBRARY,

10 OCT 1945

PART I

PRIMARY AND EXPORT INDUSTRIES.

SEASON. Favourable outlook maintained.

WOOL. Wool publicity. Appraisements and wool received in Sydney.

WHEAT. Crop condition good. Subsidy on feed, etc. wheat.
Stocks in major exporting countries.

DAIRYING INDUSTRY. Butter and Cheese production in N.S.W. and
Australia, July, 1945.

GENERAL. Superphosphate - increased supplies. Oats. Barley
Board to receive. Guaranteed price to farmers and
maximum wholesale prices. Sugar Agreement renewed.
Fish. Marketing scheme not wholly effective. Silver.
Increased price in London.

PART II

FINANCE AND TRADE. 4th Victory Loan open. Oversea Trade -
with U.S.A. - Resumption on commercial account with U.K.
Stock Exchange. Ceilings raised. Rationing - more coupon
free clothing. Real Estate - Control of land sales to
continue.

N.S.W. STATE ACCOUNTS. Receipts and Expenditure, August, 1945.

RETAIL TRADE. Sales and Stocks in Large Sydney Stores, July, 1945.

PART III

INDUSTRY, TRANSPORT, ETC.

GENERAL. Shipbuilding. Manpower - Removal from protection of
many firms. Restrictions on Use of Paper relaxed.
Industrial Disputes. Shale Oil - Glen Davis undertaking.

BUILDING INDUSTRY. Private Permits (Metropolis) and Govt. Building
(N.S.W.) and New Houses - Private and Govt., August, 1945.

RAILWAYS. Passengers, Freight and Finance, August, 1945.

MOTOR VEHICLES. New Vehicles and Total Registrations, August, 1945.

PART I PRIMARY AND EXPORT INDUSTRIES.

SEASON. Light to moderate rainfall over most of the State during the past week-end, following upon falls exceeding an inch on the North coast and northern tablelands in mid-September should sustain the promise of very good spring conditions over the greater part of the State.

WOOL. The Australian Wool Board will expend up to £30,000 on wool promotion in Australia in 1945-46 provided textiles of satisfactory quality are available. In addition it proposes providing £30,000 in the year for world wool promotion through the International Wool Secretariat.

This season, to Sept. 21, 1945 wool appraised in Sydney was 174,582 bales compared with 201,970 bales in the corresponding period of last season. The quantity of wool received in Sydney in the respective periods was 246,374 and 215,710 bales. Much of this season's wool shows considerably better condition than was expected.

WHEAT. Generally the favourable outlook for wheat (and other cereal) crops has been maintained.

A subsidy is to be paid on all wheat from Pools Nos. 6, 7 and 8 used in Australia otherwise than for human consumption to bring the return for such wheat to the equivalent of the home consumption price of wheat for flour. All pools up to No. 7 are expected to be finalised in the near future. At a recent date stocks of wheat in Australia were 25 m. bus. (mostly in Western Australia) all of which was expected to be disposed of by the end of the year.

End of season (July 31) stocks of wheat in United States and Canada were about 550 m. bus. or about 120 m. bus. less than on July 31, 1944. In Argentina exportable stocks in July, 1945 were about 105 m. bus. compared with about 200 m. bus. a year earlier. Both North American countries expect substantially smaller end-of-season stocks in 1946.

The crop outlook in Europe was reported to be the poorest of the whole war period. India had a fair crop (387 m. bus.) but unfavourable seeding conditions rendered unlikely the harvesting of an average crop in Argentina. Despite the improvement in the world statistical situation (partly attributable to ravages of war in Europe) world stocks in July 1946 may be not greatly different from the pre-war level.

DAIRYING INDUSTRY. Butter and cheese production is increasing steadily in N.S.W. The output of butter from N.S.W. factories in July, 1945 (3.3 m. lbs.) was 900,000 lb. greater than in July, 1944, equalling that of July, 1943, but 2.1 m. lbs. below the average in July, 1938 to 1940. Dairy pastures are mostly in good heart and prospects are more favourable than in the spring of any of the last few years.

BUTTER PRODUCED - N.S.W. FACTORIES.

Period	Average 1938-1940 m.lbs.	1941 m.lbs.	1942 m.lbs.	1943 m.lbs.	1944 m.lbs.	1945 m.lbs.
Season ended June	113.9	103.8	85.1	93.8	87.9	71.7
March Qr.	35.5	39.0	25.1	31.9	31.4	23.0
April	10.0	8.7	8.6	6.1	5.2	5.8
May	8.2	6.8	6.8	4.8	3.9	4.5
June	6.0	5.2	5.5	3.7	2.6	3.3
July	5.4	4.6	5.2	3.3	2.4	3.3
Total, Jan.-July	65.1	64.3	51.2	49.8	45.5	39.9

Australian production of butter increased from 13.8 m.lb. in July 1944 to 15.0 m.lbs. in July, 1945, with a heavy increase (about 56%) in Queensland and that in N.S.W. offsetting decreases in Victoria and South Australia. An increase of 831,000 lb. in Queensland was responsible for the greater Australian output of cheese in July of this year.

BUTTER AND CHEESE PRODUCED - AUSTRALIAN FACTORIES.

Period.	Butter (million lbs.)			Cheese (million lbs.)		
	1943.	1944.	1945.	1943.	1944.	1945.
Year ended June	368.2	337.8	307.2	80.6	80.0	77.1
July	16.0	13.8	15.0	3.8	3.5	3.6

GENERAL. Superphosphate. For the current season 147,000 tons of superphosphate will be available for distribution in N.S.W. compared with 110,000 tons in 1944-45.

Oats. The Australian Barley Board is to act as receivers of feed oats. Arrangements have not yet been made for milling or seed oats. For feed oats a guaranteed price of 3s. per bus. at country sidings is to be paid to growers. The Prices Commission has fixed maximum wholesale prices per bushel, delivered Sydney, of 3s.6d. for feed oats, 3s.10d. for milling oats and 4s.4d. for seed quality oats.

Sugar. The Sugar Agreement (between Commonwealth and Queensland Governments) has been received for five years on terms and conditions as for the 1941-46 period.

Fish. To enable the State fish marketing scheme to function satisfactorily further legislation to require the fish caught in N.S.W. to be sold through the Sydney Fish Markets is to be made. At present much fish is not passing through the State agents.

Silver. The price of silver in London was raised from 2s.1½d. to 3s.8d. a fine ounce on Sept. 25, 1945, reflecting the raising of the United States price for imported silver from 45 cents to 71.11 cents an oz. to the price for domestic silver.

PART II FINANCE AND TRADE.

GENERAL. 4th Victory Loan. The Fourth Victory Loan of £85 m. on the same terms as preceding loans was launched on Sept. 24 and is open till Oct. 31. To date subscriptions exceed £30 m.

Oversea Trade. Lend-lease goods "in the pipe line" are to be delivered, and the Commonwealth has also approved of purchase in U.S.A. of minimum requirements to the end of 1945, but it may be necessary to curtail subsequent buying from U.S.A. because of insufficiency of dollar credits.

Exporting to the United Kingdom may be resumed on commercial account from November, and intending exporters are required to indicate shipping space required so that tonnage requirements may be provided as far as practicable.

Stock Exchange. A ten per cent. increase in ceiling prices (attainable by daily rises over two or three weeks) on about 50 company shares was approved on Sept. 25, 1945.

Rationing. Thirtyseven minor items of clothing were made coupon free from Oct. 1, 1945.

Real Estate. The Prime Minister has stated that no early relaxation of the control of land sales is likely.

N.S.W. STATE ACCOUNTS. show no important movement in the combined accounts for July-August of this and last year. Receipts and outgoings in August were practically identical in both years. Over the two months there was a betterment of £126,000 in the Consolidated Revenue Fund and a regression of £31,000 in Business Undertakings, etc. due mainly to a reduction of £220,000 in excess earnings of the railways, partly offset by improvements of £64,000 for Sydney Harbour and of £126,000 for Main Roads Department.

NEW SOUTH WALES GOVERNMENT ACCOUNTS.

July and August.	Revenue (£ mill.)				Expenditure (£ mill.)				Excess of expenditure
	Consolidated Revenue.	Bus. Undtkgs. ϕ	Main Roads	Total	Consolidated Revenue	Bus. Undtkgs. ϕ	Main Roads.	Total	
1944-45	3.41	6.35	0.35	10.11	5.85	4.91	0.39	11.15	1.04
1945-46	3.58	6.35	0.49	10.42	5.89	5.07	0.40	11.36	0.94
movement	(+)0.17	...	(+)0.14	(+)0.31	(+)0.04	(+)0.16	(+)0.01	(+)0.21	(-)0.10

ϕ Railways, Trams and Buses, Road Transport and Traffic Fund, and Sydney Harbour.

RETAIL TRADE. In a group of large Sydney stores the value of sales in July, 1945 was 31.6 per cent. greater than in July, 1944. This is the largest increase in such a comparison for four years. It is an exaggeration of recent trend, and although combined factors of reduced coupon scales for important items and availability of recently issued ration books were probably influential factors, the universality of increases implies a tendency to freer spending, and probably a widening range of commodities for selection. An increase of 16.7 per cent. in the value of stocks (notwithstanding the much larger turnover) compared with July, 1944 lends support to the latter inference.

RETAIL TRADE - EXPERIENCE OF LARGE SYDNEY STORES.

Percentage increase (+) or decrease (-) from corresponding period previous year.

Year.	Value of Sales.						Value of Stock	
	Mar.	Apr.	May	June	July	May-July	July	May-July
1942	(+) 25.9	(+) 25.6	(-) 8.7	(-) 19.1	(-) 15.6	(-) 14.3	(+) 14.7	(+) 12.2
1943	(-) 14.1	(-) 16.0	(+) 0.8	(-) 1.3	(-) 25.5	(-) 8.2	(-) 7.7	(-) 9.6
1944	(+) 10.4	(-) 8.8	(+) 0.7	(+) 2.7	(+) 3.8	(+) 2.1	(-) 0.4	(-) 0.1
1945	(-) 6.6	(+) 3.0	(-) 9.7	(+) 19.3	(+) 31.6	(+) 10.6	(+) 16.7	(+) 22.4

The extent of increases in sales in July, 1945 compared with July, 1944 for selected groups of commodities is shown in the next table. Increased sales of household piece goods and of furniture and hardware (with the furniture group +32.2%, building materials and tools +18%, and electrical goods +43.9%) reflect the revival of house-building. It is in respect of these groups that the regain in stocks has been least, those of furniture being only 5% and of hardware only 3.9% greater in July, 1944 than a year before.

RETAIL TRADE - SALES BY LARGE SYDNEY STORES.

Percentage movement from same month in preceding year.

Month of July	Wearing Apparel.				Household Piece Goods.	Furniture and Hardware.
	Dress Piece Goods.	Women's Wear	Men's & Boys' Wear	Boots and Shoes.		
1942	(-) 42.9	(-) 25.5	(-) 28.5	(-) 25.4	(-) 2.5	(-) 10.2
1943	(+) 11.7	(-) 14.8	(-) 18.7	(-) 3.8	(-) 62.4	(-) 45.7
1944	(+) 12.0	(+) 10.2	(+) 3.2	(+) 8.5	(-) 0.9	(+) 1.9
1945	(+) 43.8	(+) 42.2	(+) 37.0	(+) 25.1	(+) 38.5	(+) 30.7

PART III INDUSTRY, TRANSPORT, ETC.

GENERAL - Shipbuilding. The Commonwealth has expended £7.43 m. on standard ship construction since 1940. For 1945-46 the sum of £3m. has been allocated of which £760,000 is for work in N.S.W. shipyards.

Manpower. Protection was removed from many firms (11,000 in Australia) late in September. These firms may dismiss, and employees may leave their employ, but to engage labour (other than persons under 18 and women over 45 years) approval of the manpower authorities is necessary.

Wartime Controls. Restrictions upon the use of paper for manufacture and to a degree for packaging have been modified to assist manufacturers and processors in resuming peacetime activities.

Industrial Disputes continue to affect Sydney electricity supply, the printing industry, coal production, wire and nail making, iron and steel and meat industries and the loading of certain ships.

Shale Oil. The Glen Davis undertaking is expected to be producing at the full production rate of 10 m. gals. a year by March 31, 1946.

BUILDING INDUSTRY. Private Permits. The value of private building permits granted in Sydney and suburbs in August, 1945 was £527,687 (of which £441,750 was for new houses). The trend is definitely upward - successive monthly totals, March to August (in £thousand) were 178,200,235,305, 356 and 528 - and the total was three-fold that for August, 1944.

Government Building. Of the total of £407,465 for contracts let or works authorised on Government account in the metropolis in August, 1945, £141,308 was for new houses. For buildings in the remainder of the State Government agencies were to expend £413,792, inclusive of £244,109 for new houses. Government building assumed a constant major importance in the industry during the war and retains that place because of the housing programme.

Total Building. Private permits in the metropolis and Government contracts, etc. in the State totalled £1,349,000 in August, 1945 compared with £754,000 in August, 1944. It will be noted that this aggregate is comparable with the monthly average of £1,274,000 in 1940; a year of high building activity. Between 1940 and 1945, however, building costs increased by something like 40 per cent.

VALUE OF PUBLIC AND PRIVATE BUILDING.

Period.	Metropolis.			Government		Total Cols.1 and 5 (6)
	Private (1)	Government (2)	Total (3)	Country (4)	Total,N.S.W. (5)	
Monthly average value in £ thousands.						
1940	977	74	1,051	223	297	1,274
1944	134	146	280	91	237	371
Jan. - Aug.1944	125	148	273	95	243	368
Jan. - Aug.1945	267	216	483	101	317	584
Aug.1944	176	291	467	287	578	754
Aug.1945	528	407	935	414	821	1,349

Housing. Housebuilding, under both private permits and Government auspices is showing marked expansion, and in August, 1945 new houses to be erected in Sydney and suburbs numbered 568, exceeding the number in the pre-war month of August, 1939 by 80, and the monthly average in 1944 by over 500. Included in the total were 443 under private permit. It is problematical, however, whether immediate construction of a considerable proportion of these can proceed owing to shortage of vital materials, including bricks, lime, cement, nails and screws and essential fittings, as well as of building tradesmen.

NEW HOUSES - SYDNEY AND SUBURBS.

	1939	1944	1945.						Total Jan.-Aug. '45.
			Mar. Qtr.	June Qr.	May	June	July	August	
	Monthly averages								
Private Government	487	29	87	181	179	224	255	443	1,503
	1	37	37	95	88	180	194	125	715
Total	488	66	124	276	267	404	449	568	2,218

Government contracts or authorisations made in August, 1945, covered 193 new houses outside the metropolis, compared with totals of 154 in the seven months ended July, 1945 and of 159 in the whole of the year 1944.

The control of building materials (other than those imported) and the administration of private building permits is proposed to be transferred from the Commonwealth to the States as from 1st November, 1945.

RAILWAYS. In August, 1945 N.S.W. Government railways carried a record number of passengers, but a smaller tonnage of goods and livestock than in August of any other wartime year. Curtailment of train mileage due to the shortage of coal and reduced transportation of war goods are major factors in the latter decrease.

Gross earnings have decreased more than have operational costs, and in July-August, 1945 net earnings (£1.28m.) were little more than half those of that period of 1942-43.

N.S.W. GOVERNMENT RAILWAYS.

Year	Month of August.			Two months ended August.			
	Passenger Journeys	Goods and Livestock	Gross Earnings	Passenger Journeys	Goods and Livestock	Gross Earnings	Net Earnings ϕ
	millions	'000 tons	£000	millions	'000 tons	£000	£000
1938-39	15.8	1,284	1,567	31.4	2,713	3,123	765
1942-43	19.9	1,701	2,851	38.2	3,360	5,577	2,329
1943-44	20.7	1,769	3,074	40.4	3,504	6,026	2,140
1944-45	20.3	1,683	2,831	41.5	3,330	5,515	1,616
1945-46	21.7	1,449	2,729	44.0	3,024	5,363	1,278

ϕ Gross earnings less working expenses - available to pay interest etc. on railway loan debt.

MOTOR VEHICLES. The Secondary Industries Commission expects a light car to be in production in Australia by about June, 1947. There are trade expectations that new British cars may begin arriving in Australia by the end of 1945.

In August, 1945 the number of new cars, lorries and vans registered, in N.S.W. averaged only 50 per week compared with 468 per week in the pre-war month.

At 31st August 1945 there were 300,343 vehicles of all kinds on the register. A regain of nearly 33,000 from the wartime low point in July, 1942 means that the scope for re-registration has contracted but the expanding petrol ration may result in return of laid-up vehicles, particularly pleasure cars, in appreciable numbers. Comparative increases are shown on next page.

There were in August, 1945 about 30,900 fewer cars, but 6,700 more lorries and vans than prior to the war (i.e. August, 1939).

MOTOR VEHICLES REGISTERED IN NEW SOUTH WALES.

Type of Vehicle.	New registrations			All registered motor vehicles.						
	Aug., 1939	Aug., 1944	Aug., 1945	No. at end of -				Increase in Jan.-Aug.		
				Aug. 1939	July 1942 x	Aug., 1944.	Aug., 1945	1939.	1944.	1945.
	Av. no per week.			000	000	000	000			
Cars	322	5	6	216.6	170.0	181.7	185.7	4,631	4,495	1,301
Lorries & vans	146	62	44	77.6	70.9	78.5	84.3	1,190	3,428	3,762
All vehicles ϕ	468	67	50	329.2	267.4	287.6	300.3	6,279	9,213	6,789

ø Total cars, Lorries and vans only for new registrations.

x Lowest war-time number of cars.